



Documenting a Referral in CCTO

COVID-19 Community Team Outreach

Referring a contact to support for a resource need requires appropriate documentation:

Documenting a Resource Need & Referral

1. Resource needs can be identified in a digital assessment or in a manual assessment entered by the tracer on the phone. *These needs will be visible in "Resource View for Contacts I Own."*
2. Discuss the need with your contact and **document the conversation and any information about the need within a phone call in Timeline/Activities.**
3. If the contact consents to be linked to a community partner to help meet their resource need, **you should also record this information within your phone call for the conversation. In the description, note any relevant information such as the contact's consent to linkage and the vendor name/phone number you provided.** Save and close this call.
4. **Set another phone call with a due date 24 hours later** reminding you to follow up with this contact and confirm that they reached the vendor.
5. Upon follow-up, if your contact confirms that they were able to connect with the vendor or have decided not to pursue linkage, **update the call description and close it to conclude this process.**
6. **If the contact was unable to connect with the vendor, update the call description, close it, and create a follow-up task for yourself to begin escalation per your local guidance. If appropriate, this task may also be assigned directly to your escalation point of contact.**

1

Document need in assessment

2

Log phone call

3

Document referral

4

Set follow-up call

5

Close follow-up

6

Create escalation task

1

Additional Questions

Access to Phone or Computer? Yes

Do you have a face covering at home with you? Yes

Able to remain in your home without guests during quarantine? Yes

Do you have the ability to isolate yourself within your ... No

Do you have any household members that are high risk for ... Yes

Do you have someone that could run errands and get ... No

Do you have a primary care provider? Yes

Other

Resource View for Contacts I Own

Source Contact	Date	Created On	Local Health	Owner (Source Cont.)	Assessment Type	OK for LHD	Ability to Is...
Snow White	9/1/2020	9/1/2020 ...	Dare	Mary Moran	Initial	Yes	No
Teddy Bear	9/1/2020	9/1/2020 ...	Dare	Mary Moran	Monitoring	Yes	Yes
Teddy Bear	9/1/2020	9/1/2020 ...	Dare	Mary Moran	Monitoring	Yes	Yes
Teddy Bear	9/1/2020	9/1/2020 ...	Dare	Mary Moran	Initial	Yes	Yes
Miss Piggy	8/21/2020	8/20/2020...	Dare	Mary Moran	Initial	---	---

Timeline / Activities

Timeline

Search timeline

Enter a note...

4 MM Phone Call from Mary Moran
Follow Up Call About CHW Referral
Due 9/19: Call contact to ensure she was able to connect with CHW per 9/18 referral.
Active 9/18/2020 9:49 AM

2 MM Phone Call from Mary Moran
Daily Monitoring Call
Contact stated a need for assistance with childcare in order to isolate away from others. Referred to CHW at XXX-XXX-XXXX. Let contact know I would be following up tomorrow to ensure they were able to connect with the CHW.
Closed 9/18/2020 9:46 AM

3

5 MM Phone Call from Mary Moran
Follow Up Call About CHW Referral
9/19 Confirmed Snow spoke with CHW who will be providing assistance for childcare.
Closed 9/18/2020 10:01 AM

MM Phone Call from Mary Moran
Daily Monitoring Call
Contact stated a need for assistance with childcare in order to isolate away from others. Referre...
Closed 9/18/2020 9:46 AM

6 MM Task modified by Mary Moran
Escalation of CHW Referral to Supervisor
Issue with contact connecting with CHW - escalation required
Active 9/18/2020 9:53 AM

MM Phone Call from Mary Moran
Follow Up Call About CHW Referral
9/19 Contact was unable to connect with CHW. Escalating to supervisor.
Closed 9/18/2020 9:51 AM

MM Phone Call from Mary Moran
Daily Monitoring Call
Contact stated a need for assistance with childcare in order to isolate away from others. Referre...
Closed 9/18/2020 9:46 AM